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Fr. Pierrot Kasemuana, Executive Director, Caritas Mongolia
01 September 2017



A traditional Mongolian 'ger', typical of nomadic life
Credit: All pictures in the documents are taken by CM staff and volunteers.

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PART I: INTRODUCTION

CM History & Milestones

Caritas Mongolia is part of Caritas Internationalis, a Vatican-based confederation of more than 160 Catholic aid, development and social justice agencies from around the world, working with the poor, vulnerable and excluded, regardless of gender, race or religion. Caritas Mongolia (CM) was registered as a Mongolian NGO in 2010 in the capital of Ulaanbaatar (UB), and today, it has 25 staff and 30 volunteers. As a faith-based organization shaped by Gospel values and Catholic Social Teaching (CST), CM promotes sustainable development through seven main programs:

CM's 7 Programs

Capacity-Building of Cooperatives

The project supports rural cooperatives through the provision of high-quality extension services along the entire horticultural value chain, including training in management and business development, as well as organic farming technology.

Education

CM has set up a daycare center in the "ger" area for children from vulnerable families. Here, it provides them with pre-primary education, nutritious food, and medical care in a safe environment.

Emergency Response

Mongolia often faces drought, dzud, heavy rains, flood, hail, heavy snow, and dust storms. CM helps the poor recover from these disasters and rebuild livelihoods more resilient to climate change.

Food Security & Agriculture

This program provides small farming communities with technology, training and networks to meet their household nutritional needs, expand production so they can integrate into the markets, and cope more effectively during environmental and economic hardship.

Gender and Advocacy

CM advocates against sexual violence, works with the victims of domestic abuse and violence against women, and empowers women with livelihood skills such as sewing and vegetable cultivation.

Research and Development (R&D)

CM's passive solar greenhouses (PSGH), trench greenhouses (TGH) and biodynamic cellars, water management and soil-conservation packages have helped rural farmers extend agricultural activities up to nine months, compared to only three months with traditional greenhouses.

Social Reintegration

This program seeks to achieve economic reintegration of Mongolians returning home after an unsuccessful look for work in Europe, enabling them to find sustainable work in their own country.

CM Milestones

- » **1999:** Began as a dzud-relief operation in the Uvurkhangai and Tuv Provinces
- » **April 15, 2010:** Registered as a local NGO in UB
- » **2010:** Commenced its first four-year strategic plan
- » **May 21, 2011:** Became full member of Caritas Internationalis
- » **2014:** Began the second four-year strategic plan
- » **2017:** CM now operates with 25 staff: 19 women and 6 men



CM assists herders with their animals during the 2016 dzud

Vision, Mission and Values

Vision: People will live free of poverty in a healthy, secure and just society.

Vision 2020: Caritas Mongolia is a professional, well known, respected, networked and sustainable organization that advocates in partnership with the poor and leverages local and international volunteers to aid vulnerable communities in unstable socio-economic situations, as well as people affected by natural disasters.

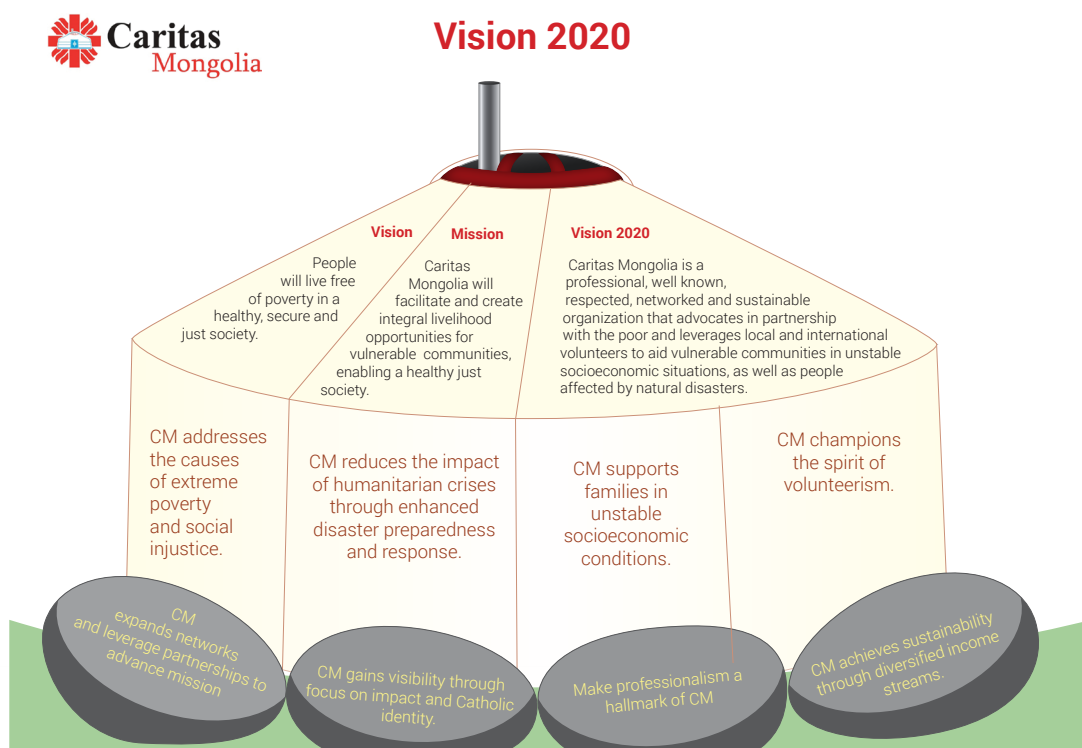
Mission: Caritas Mongolia will facilitate and create integral livelihood opportunities for vulnerable communities, enabling a healthy and just society.

Values

Human Dignity	Our belief in the sanctity of human life and the inherent dignity of the human person is the foundation of all our work.
Preference for the Poor	In Catholic teaching, basic moral test for any society is to assess the situation of its most vulnerable members.
Community & the Common Good	Our tradition sees each person as not only sacred but also social. This guides us to build the capacity of individuals to grow in their communities.
Dignity of Work	We believe that each person has the right to productive work and fair wages, and that the economy must serve people, not vice versa.
Stewardship of Creation	Catholic tradition calls us to serve and protect the people and planet, so that we live our faith in relationship with all of God's creation.
Solidarity	CST maintains that we are one human family, whatever our ethnic, economic, and ideological differences.
Promotion of Peace	In the words of Pope John Paul II, "Peace is not just the absence of war. It involves mutual respect and confidence between peoples and nations."

Executive Summary

Caritas Mongolia (CM) is embarking on a four-year journey with a new strategic plan. With this new strategic direction, it aims to respond to the new challenges the country is facing, while building on its past achievements, strengths and history. CM has identified five strategic orientations, in line with Caritas Internationalis' (CI) strategic plan. The 5 strategic orientations are translated into 8 strategic objectives that respond to the most urgent needs that CM identified for Mongolian society. Four of these strategic objectives (Gain visibility through focus on impact and Catholic identity, Expand networks and leverage partnerships to advance mission, Make professionalism a hallmark of CM and Achieve sustainability through diversified income streams) are more internally focused and will allow CM to develop and implement better programs (Reduce the impact of humanitarian crises through enhanced disaster preparedness and response, Support families in unstable socio-economic conditions, Address the causes of extreme poverty and social injustice and Champion the spirit of volunteerism). In addition, CM identified six crosscutting issues that will be mainstreamed in all its programs.



The new strategy will require CM to build new expertise and capacity. The organizational set up will change during the next 4 years to ensure successful implementation of the strategy. An estimated 39 full time people will be working for CM in 2020 (up from 25 in 2017). The total budget of Caritas Mongolia for the next four years is an estimated EUR 1,978,901 USD 2,150,979.

PART II: STRATEGIC ORIENTATIONS & OBJECTIVES

Six Crosscutting Themes

Caritas Mongolia has identified six crosscutting themes or approaches that it will mainstream throughout its work during 2017 to 2020. These themes are:

Community Building and Empowerment

In line with CI priorities, CM will promote the empowerment of people through animation and training, so that they can enhance their role as citizens and organize themselves into dynamic and self-reliant communities, whether in urban or rural areas.

Key activities planned for the next four years:

To develop a 'community building and empowerment' document that will serve as a reference in the Mongolian context.

To provide staff training on community building and empowerment methodologies and approaches.

Integral Human Development

As CM operates on the principle of 'attention to the whole person,' its program development will assess the different aspects of the person or community requiring support, and their interrelatedness at all levels.

Key activities planned for the next four years:

To develop an integral human development (IHD) framework specific to the Mongolian context.

To provide staff training on IHD and integrate the concept in program development.

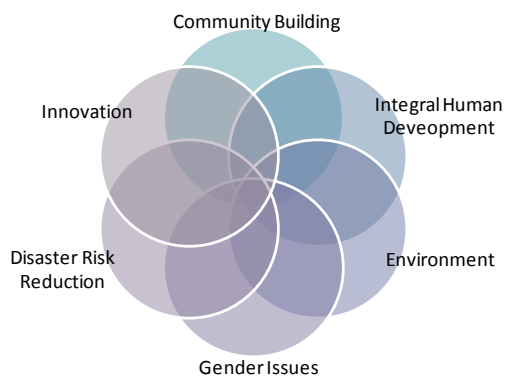
Care for the Environment

Rural livelihoods in Mongolia are regularly disrupted by dzuds¹, desertification, flooding, and the other effects of climate change; and Ulaanbaatar is one of the world's most polluted cities, especially during winter. CM decided to mainstream 'care for the environment' in all its activities when environmental concerns came up as a priority during the strategic planning exercises.

Key activities planned for the next four years:

To develop an advocacy document and campaign on 'care for the environment'.

To develop and implement an in-house environment policy (focus on 3R).



¹ *A "dzud" is a multiple natural disaster consisting of a summer drought resulting in inadequate pasture and production of hay, followed by very heavy winter snow, winds and lower-than-normal temperatures (below -50°F). Dzuds occur when the winter conditions – heavy snow cover in particular – prevent livestock from accessing pasture or from receiving adequate hay and fodder.

Gender

One of the key challenges Mongolian society faces is that of gender-based violence (GBV). It has therefore formulated a special strategic objective (number 4.2) in the strategic plan to exclusively address the issue of GBV.

Key activities planned for the next four years:

- To mainstream gender in CM's HR and other policies.
- To develop a gender checklist for CM programs.
- To mainstream gender in all CM programs.



*CM Skill Training Center
beneficiary Ms. Gerelt-Od*

Disaster Risk Reduction

Investments in disaster risk reduction (DRR) have shown to have a high cost-benefit impact. Given Mongolia's vulnerability to the effects of climate change, CM will mainstream DRR in all its activities.

Key activities planned for the next four years:

- To develop a DRR-mainstreaming policy.
- To develop a DRR checklist for CM programs.
- To mainstream DRR in all CM programs.



*Emergency Response in
Bayan-Ulgii province*

Innovation

CM seeks to grow as an organization that can identify innovative solutions that address the main issues faced by Mongolia's communities. Innovations can be both technical (such as passive solar greenhouse (PSGH) projects) as well as how programs are delivered.

Key activities planned for the next four years:

- To promote eco-friendly technologies in CM's projects.
- To promote an organizational culture of innovation.



*CM's Food Security and Innovative
Farming Project: Ms. Sainbileg*

Strategic Orientation 1: Caritas at the Heart of the Church

Caritas Mongolia (CM) upholds the Christian identity of Caritas as an essential service that the Church provides to the poor. As a Catholic faith-based organization guided by Gospel values, CM operates on the principle of preferential treatment for the poor and thus aids vulnerable individuals and communities in distress, irrespective of ethnicity, creed, gender, sexuality, age or ability.

Strategic objective 1: Gain visibility through focus on impact and Catholic identity

As CM's low visibility has often been highlighted by staff and beneficiaries, it was decided to strengthen its communications with the general public and local churches. With respect to the latter, CM aims to promote and animate Parish Caritas and associations of the faithful at the community level, creating spaces where persons living in poverty can be invited to share their experiences, joys and hopes.

Beneficiaries

The target population for this strategic objective is the entire population in Mongolia. A conscious effort will be done to communicate with other church based organizations. There will also be an effort to reach out to interested partners / organizations outside of Mongolia.

Key Resources

There are 2 main resources that are indispensable:

A dedicated PR resource person who will increase the visibility of CM by attending conferences and events, update FB / social media and website, organize press conferences etc.

Volunteers who help with translations, design work, organizing events etc. This will be both online volunteers, as well as volunteers based in Mongolia (national and expat).

Key activities

- To visit organizations and attend meetings / events.
- To organize events / activities to increase visibility (e.g. press conference, send out press releases).
- To develop PR material.
- To develop content based material (e.g. impact studies, R&D, annual report, newsletters).
- To develop a communication plan and strategy.
- To create a community of volunteers to support CM.
- To keep up-to-date all PR material (including FB and other forms of social media).
- To set up / maintain a contact database.
- To promote and animate Parish Caritas and associations of the faithful at community level to become places where persons living in poverty and/or with other needs can be invited to share their experiences, their joys, and their hopes.

Key partnerships

Key partnerships will be the media and the Caritas partners. The media will help increase visibility in Mongolia while the Caritas partners will be asked to help promote CM outside the country.

Strategic Orientation 2: Save Lives, Rebuild Communities

CM seeks to reduce the impact of humanitarian crises by enhancing its emergency response (ER) and disaster risk reduction (DRR) capacities, and by implementing these in a spirit of fraternal cooperation, in partnership with other organizations.

Strategic objective 2: Reduce the impact of humanitarian crises through enhanced disaster preparedness and response

Responding to disasters is one of the pillars of Caritas' mission. CM seeks to provide rapid, effective and coordinated emergency responses in Mongolia, according to international humanitarian standards (e.g., SPHERE), as well as those of Caritas' own network (e.g., CI Emergency Response Toolkit). Through this objective, CM aims to help achieve SDG 1: End poverty in all its forms everywhere; and SDG 13: Take urgent action to combat climate change and its impacts.

Beneficiaries

The target groups for CM's ER and DRR projects are vulnerable households that are least likely to recover from natural disasters. These are typically low-income, large or women-headed households, or those with disabled people, pregnant women, children and the elderly. CM will focus its relief operations in locations and affected communities that do not receive assistance from the government or I/NGOs.



Emergency response in the Uvs Province with the Ganbold family

Key Resources

Funding (to be available in a very short time), transport to and from the disaster-affected areas (for assessments, delivery of relief items, etc.), qualified ER staff, volunteers and partners (e.g. National Emergency Management Association or NEMA).

Key Activities

- Develop an emergency response plan to ensure preparedness.
- Set up an emergency response fund for immediate use till solidarity is received from the Caritas network and others.
- Develop and maintain a strong relationship with NEMA.
- Mainstream DRR in all project activities, including insurance promotion and awareness raising.
- Build DRR capacity and expertise; recruit and train ER volunteers.
- Write proposals to access ER and DRR funding.

Key Partnerships

- Government partners, NEMA and other agencies for ER implementation.
- Suppliers and vendors (to quickly supply food, non-food items, and emergency goods).
- Transport companies to deliver emergency goods to affected areas.
- Donors and the Caritas network for funding and technical support.
- NGOs for coordination and information/resource sharing.
- Trained ER volunteers.



Emergency response operations in the Uvs Province

Strategic Orientation 3: Promote Sustainable Integral Human Development

CM seeks to eradicate poverty in all its forms by empowering people through quality education and productive employment.

Strategic objective 3: Support families in unstable socio-economic conditions

Sustainable development is essential to achieving human dignity. CM aims to empower the poorest, most disadvantaged and marginalized communities by enabling them to develop their own means of livelihood. During 2017-20, CM aims to support families in unstable socio-economic and human conditions through three main programs, centered on the provision of:

- Vocational and life-skills training to poor and vulnerable men and women.
- Education opportunities for children from poor and vulnerable families in UB.
- Climate Resilient Agriculture (CRA) support to vulnerable farmers.

Strategic objective 3.1: Provide vocational/life skills training to the poor

CM has set up a Skills Training Centre (STC) to provide short-term practical trainings for poor and vulnerable men and women in UB's 'ger²' areas to produce handicrafts, clothing and other saleable items. Many of the trainees are recent internal migrants without the skills to find decent employment in UB. The Centre provides government-certified trainings that can supplement existing incomes. The objective contributes to SDG 8: Promote sustained, inclusive and sustainable economic growth, full and productive employment, and decent work for all.

Beneficiaries

The target groups for this objective are vulnerable women and men, internal migrants, school dropouts, and low-income workers. STC aims to train 1,152 people during the next 4 years.

Key Resources:

- Qualified staff to conduct training and manage the STC.
- A building or training venue and training equipment.
- Funding to cover running costs and investments in equipment.
- Micro-grants to help trainees set up their own small business.
- Volunteers and reputation/brand.

Key Activities

- Train beneficiaries and link them with job-placement centres.
- Issue micro-grants for beneficiaries to buy equipment.
- Organize workshops on social issues for beneficiaries.
- Train STC staff to deliver high-quality technical skills training.
- Conduct quality control for the trainers, trainings and products.
- Produce high-quality handicrafts for the Mongolian market.
- Develop a marketing plan and sales strategy for STC products.
- Promote the STC and its products by attending handicraft fairs

² The ger districts lie on the outskirts of UB and almost encircle the city. They lack running water, sewage, and heating but still house over 60% of the city's population.

Key Partnerships

- Local training centres.
- Job-placement agencies to help find suitable work for the trainees.
- Funding partners to support running costs and capital investments.
- Government agencies to provide the required certifications.
- Caritas member organizations to provide technical and financial support.
- Graduates employed for the production of orders.
- Existing and potential consumers.
- Experts, volunteers and local expats to help increase training quality.



CM-Skill Training Centre: from left Ms. Munguginj, Ms. Altantuya, Ms. Bolorsarnai, Mrs. Chimgee

Strategic objective 3.2: Provide pre-primary education for vulnerable children in UB

CM operates a day care center (DCC) in the ger area to provide affordable education for children from poor and vulnerable families in this location. The DCC helps address the problems of overcrowding and lack of access to education in the ger areas. CM plans to upgrade the DCC facilities in 2018 and acquire government recognition for it as a Montessori kindergarten. Through these efforts, CM will contribute to SDG 4: Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all.

Beneficiaries

The beneficiaries are the more vulnerable segment of UB's ger areas: parents who are unable to cover the expenses of a 'regular' kindergarten, mainly because of unemployment or very low income. Once the DCC is upgraded to a kindergarten, CM will also reach out to children whose parents train at the STC. CM plans to serve 100–200 children during the next four years.

Key Resources

- A building and facilities to host the school (with the capacity to accommodate the planned upscale). This is the most essential resource.
- Qualified teachers and staff (including a nurse).
- Transport to bring the children to/from the school.
- School/teaching equipment to ensure a high-quality learning environment.
- Kitchen equipment to cook healthy, organic meals for the children.
- Funds to cover running costs. An initial capital injection will be required to, or:
 - » Refurbish an existing building to make it suitable for a kindergarten, ensuring that it meets all government requirements. This will require a smaller capital injection.
 - » Construct a purpose-built school building and facilities. This will require a larger capital injection.
- Volunteers to add value and a different dimension to some subjects (e.g. English).

Key Activities

- Teach children as per the Montessori Method/curriculum.
- Administrate and manage the school.
- Obtain government accreditation as a Montessori kindergarten.
- Fundraise to purchase equipment and cover running/maintenance costs.
- Conduct medical checkup for the kids.
- Conduct parent outreach on education on social issues.
- Organize extracurricular activities for children and parents.
- Build and maintain relationship with key partners.



A little girl at CM's Day Care Centre



Teacher Mrs. T. Bolortsetseg with Gegeentungalag

Key Partnerships

- Mongolia's Department of Education: For certification and support.
- Funding partners: To cover the investment for refurbishment/construction and running costs.
- Technical partners: For expertise in areas such as teaching and school management.
- A local clinic: For regular medical check-ups.
- Suppliers and vendors: For good and services such as food, school equipment and transport.
- Other schools: As partners for inter-school sports and extra-curricular activities.
- Sponsors/change agents: Not only for financial support but also for active involvement with each child (CM expects this to be its differentiator vis-à-vis other day care centers).



At the DCC with Bp. Isao Kikuchi, Caritas Asia President; Ms. Yoko Yokoyama, Caritas Japan; DCC Director and teachers and children

Strategic objective 3.3: Promote Climate Resilient Agriculture (CRA)

CM aims to support sustainable food production systems through the promotion of climate resilient agricultural practices that increase productivity and production. Activities under this strategic objective will strengthen the capacity of local communities to adapt to climate change, extreme weather, drought, flooding and other natural events that affect crops, land and soil quality. This objective links to SDG 2: End hunger, achieve food security and improved nutrition and promote sustainable agriculture.

Beneficiaries

The key target group under the CRA objective is vulnerable vegetable growers, both rural and urban. Besides individual farmers, CM will also work with horticultural cooperatives. It aims to reach 1,192 farmers during the next 4 years while working with at least 11 cooperatives.

Key Resources

- Professional, dedicated and knowledgeable staff: CM plans to operate as a training consultant and will request a basic costs-recovery fee from certain cooperatives.
- Financial resources to pay salaries and provide subsidized inputs for the cooperatives.
- Access to banks/MFIs for microcredit for the cooperatives: CM will provide subsidized inputs but expects these to reduce gradually^{3*}.
- Access to markets and vegetable buyers for the cooperatives.
- Land for R&D purposes and transport to conduct field visits.
- A good reputation as an organization that provides quality training and advice on organic, climate-resilient agriculture.

Key Activities

- Mobilize individual vegetables farmers to build communities and set up cooperatives.
- Strengthen cooperatives through trainings, accompaniment and subsidized inputs.
- Conduct trainings on CRA and organic farming for individual farmers and cooperatives.
- Conduct practical research on organic farming and greenhouse development.
- Facilitate market access and promote market linkages for cooperatives.
- Establish partnerships with banks, MFIs, insurance agencies and certifying agencies.
- Support the participatory guarantee systems (PGS) of cooperatives.
- Write proposals to access funding.

Key Partnerships

- Funding partners, government departments, NGOs, and suppliers/vendors.
- MFIs and banks to access investments/loans for the cooperatives.
- Organic agriculture inspection agencies to guide CM on PGS and other certifications.
- Caritas networks to provide technical as well as financial support.
- Insurance companies to provide risk coverage for farmers and cooperatives.



CM's R&D plot in Bayankhoshuu



CM's R&D plot in in Shuwuu

³ *E.g. the income from solar passive greenhouses should, in time, enable cooperatives to recover their initial investment.

Strategic objective 4: Address the causes of extreme poverty and social injustice

Traditionally, CM has opted to directly implement projects targeting communities facing poverty and social injustice. It will continue working directly with these communities, but during the next four years, CM will add advocacy to its list of strategic priorities.

Strategic objective 4.1: Commence advocacy initiatives

CM will select advocacy areas as per the priorities of CI, the UN and the Government of Mongolia (GoM). It expects the key issues to include social justice, environmental justice, gender (and gender based violence in particular), and the right to food. Advocacy initiatives will include government/private sector practices that are detrimental to the poor. CM's efforts will be guided by SDG 16: Promote peaceful and inclusive societies for sustainable development, provide access to justice for all, and build effective, accountable, and inclusive institutions at all levels.

Beneficiaries

The key beneficiaries of the advocacy efforts are households facing extreme poverty and social/environmental injustice. CM will target government departments, companies, CSOs and especially students to advocate for change. With the help of its partners, CM aims to impact the lives of 250,000 people through policy and/or systems changes by 2020.

Key Resources

As advocacy was previously classified under 'diversification' (creating a new program for a new type of beneficiary), CM will have to source expertise in advocacy and develop content to support its advocacy points. This will require continuous and reliable access to communities for first-hand accounts of their concerns and issues.

Key Activities

- Train staff in advocacy and/or hire a dedicated advocacy/communication officer.
- Document and prioritize advocacy issues and develop supporting documents and talking points.
- Identify suitable partners such as like-minded organization and research institutes.
- Establish relations and reach out to policy/decision makers to highlight the concerns of local communities.
- Build coalitions and gather support from stakeholders to influence policy/decision makers.
- Develop and promote policy positions (including those taken in coalition).
- Campaign on policy positions.
- Raise student awareness on social and environmental justice issues.
- Organize press briefings on the issues identified by grassroots communities.
- Participate in at least 2 global CI policy initiatives.
- Attend conferences to raise awareness.
- Raise funds to support advocacy initiatives.

Key Partnerships:

- Media outlets: To disseminate the key advocacy messages.
- Communities affected by injustice: To collect data on transgressions.
- Research agencies: To translate this data into concrete and actionable advocacy items.
- CSOs: To develop a larger, better informed and thus more 'powerful' advocacy front.

Strategic objective 4.2: Advocacy on gender-based violence

Amongst its advocacy initiatives, CM plans to pay special attention to the issue of gender-based violence (GBV), linking its work with SGD 5: Achieve gender equality and empower all women and girls.

Beneficiaries

The target group is women who are GBV victims and women at risk of experiencing GBV. For the awareness raising and advocacy activities, CM will work with youth and the larger public.

Key Resources

PR/advocacy staff and partners to provide professional support to the women referred by CM.

Key Activities

- Establish partnerships and networks with organizations that work on GBV.
- Refer GBV victims and those at risk to appropriate partners.
- Raise awareness on GBV and advocate against it.
- Mainstream gender and GBV into all CM projects.
- Increase gender and GBV awareness amongst CM staff.

Key Partnerships

Police, GBV-specialized lawyers, NGOs that work with women, the Gender Equality Centre, the Skills Training Centre (STC), hospitals, counseling centers, schools and the media.



Discussion on social issues

Strategic Orientation 4: Build Global Solidarity

Caritas Mongolia wants to address the causes of extreme poverty through strengthened communication, education and mobilization, and enhance the visibility of Caritas.

Strategic objective 5: Expand networks and leverage partnerships to advance mission

CM aims to partner with organizations in and outside Mongolia to access knowledge and expertise, contacts, and funding in support of its mission, 'People will live free of poverty in a healthy, secure and just society'. This would also enable CM to advance the Caritas Internationalis objective to 'create synergies among members, committing them to exchange knowledge, tools and good practices, in a spirit of open and transparent sharing'. This objective contributes to SDG 17: Strengthen the means of implementation and revitalize the global partnership for sustainable development.

Beneficiaries

Mongolian citizens and organizations, as well as partners outside Mongolia

Key Resources

- A dedicated PR resource person: To increase visibility by disseminating success stories, organizing press conferences, and updating CM's website and social media channels.
- A local part-time resource person to liaise as a government-relations officer.
- Onsite and online volunteers: To assist with translations, design work, event organization etc.

Key Activities

- Hire a dedicated PR and/or government-relations officer.
- Develop a communication plan and strategy.
- Develop PR material for dissemination to stakeholders.
- Develop content-based material (impact studies, annual report, newsletters, R&D).
- Update website and social media channels on a regular basis.
- Organize and/or participate in NGO/GoM conferences and events to increase visibility.
- Map and identify appropriate partners.
- Set up and maintain a database of key contacts and potential partner organizations.
- Create a community of volunteers to support CM.

Key Partnerships

To build a larger and more diverse network of relationships and partnerships, CM will approach the following categories of organizations:

- National and local government departments.
- Mongolian NGOs and like-minded organizations in the country.
- Funding partners in Mongolia (e.g., embassies) and abroad (e.g., Caritas organizations, I/NGOs).
- Caritas partners to help promote CM outside the country.
- Parishes, private-sector organizations, potential sponsors/change agents.
- Media to increase visibility and the hospitality sector (hotels, restaurants) to host events.

Strategic Orientation 5: Make Caritas Mongolia More Effective and Efficient

Over the next four years, CM seeks to enhance its organizational competence, visibility, professionalism, sustainability and inclusiveness by nurturing an organizational culture of service, commitment and fraternal cooperation, guided by CST and Gospel values.

Strategic objective 6: Make professionalism a hallmark of CM

In the Encyclical 'Deus Caritas Est', Pope Benedict XVI wrote: "Individuals who care for those in need must first be professionally competent: they should be properly trained in what to do and how to do it, and committed to continuing care." Pope Benedict also called for a 'formation of the heart': "We are dealing with human beings, and human beings always need something more than technically proper care. They need humanity."

CM aims to meet 100% of the CI management standards by 2020. In order to achieve this, it will:

- Hire a dedicated HR expert and develop HR practices and tools (e.g., performance reviews).
- Plan yearly reflection moments to help staff and board appreciate Gospel values and CST.
- Create comprehensive manuals for:
 - » HR policy
 - » Volunteer management
 - » Complaint procedures
 - » Risk reduction policy
 - » Finance policy
 - » Monitoring and evaluation
 - » Communication policy
 - » Information disclosure policy
 - » Fundraising strategy



CM headquarters at the Sts. Peter and Paul Cathedral

Strategic objective 7: Achieve sustainability through diversified income streams

CM aims to increase its financial sustainability and decrease its dependency on external funding by diversifying its income sources and increase its level of unrestricted funding.

Beneficiaries

CM has segmented the 'target' groups for resource development into six categories. These are groups that CM believes will benefit from mutual collaboration.

- **Bilateral donors:** CM plans to strengthen and enrich relations with Caritas member organizations, which have been the traditional supporters of its work.
- **Institutional donors:** CM has begun tapping embassies and foundations with its EU funding and will further explore resource mobilization from UB-based organizations.
- **Government agencies:** The GoM has been providing subsidies to some CM projects. CM will explore further avenues to directly/indirectly access resources made available by the GoM.
- **Faith-based organizations:** This hitherto untapped segment consists of local Churches and other faith based organizations that may see mutual benefit in cooperating with CM.
- **The private sector:** This is another untapped segment but needs some initial investment and commitment before it can start yielding results.
- **Individuals:** CM does not plan to actively approach this segment (e.g., through F2F fundraising), but better public visibility would make it easier to raise funds through events.

Key Resources

- A dedicated PR person to increase organizational visibility.
- A dedicated fundraising (FR) person (once funding streams are diversified).
- Qualified field staff and expat volunteers to support the PR and FR teams.

Key Activities

- Develop a detailed four-year fundraising/resource mobilization plan.
- Raise funds from different sources to support existing programs and to invest in new projects.
- Research the possibility of starting our own income-generating activities. CM is considering two options to increase the level of unrestricted funding: Set up a ger camp or a small guesthouse. Both options require more detailed finance and business feasibility studies.
- Hire a dedicated PR/FR resource person.
- Develop and distribute PR material: CM can increase its visibility by consistently publishing its annual report, newsletters, success stories, and project outcomes.
- Use social media more frequently to increase visibility.
- Build relationships with potential partner organizations that CM is currently not in contact with.
- Organize biannual fundraising events
- Develop the necessary infrastructure and tools to support fundraising activities .

Key Partnerships

- **Media:** To increase visibility and reach all stakeholders.
- **Hotels/event organizers:** To manage fundraising events.
- **The Caritas network:** To provide skills, capacity and funding.
- **Professional volunteers:** To help execute PR/FR events.

Strategic objective 8: Champion the spirit of volunteerism

CM aims to bring people and communities together to facilitate mutual understanding and build global solidarity. One way CM will do this is through the promotion of volunteerism. Many of the SDGs call for long-term attitude and behavior changes, and the 2030 Agenda explicitly recognizes volunteer groups as stakeholders to achieve the 17 SDGs.

Beneficiaries

CM aims to have a large and varied body of volunteers, mobilizing in total 1,723 local and international volunteers by 2020.

- Professional volunteers: International and local.
- Student volunteers: International and local.
- Parishioners and retired volunteers: Local

Key Resources

- Volunteer database.
- Dedicated PR/communications team.
- Dedicated full/part-time volunteer manager.
- PR and communication material.
- Volunteer systems and policies.
- Brand and reputation.

Key Activities

- Identify volunteer opportunities.
- Mobilize volunteers for advocacy, awareness-raising, and other programs.
- Communicate volunteer opportunities and volunteer contributions.
- Build and maintain channels to reach volunteers.
- Develop and maintain a volunteer database.
- Hire a volunteer manager (or assign this task to HR).
- Develop a volunteer manual, orientation package, and PR material.

Key Partnerships:

- School management: To access local student volunteers.
- Parishes: To access church volunteers.
- Companies: To source local professional volunteers.
- Caritas network: To source international professional or student volunteers
- Hotels and travel agencies: to help with volunteer logistics



French Scouts at the DCC



Volunteer program with teachers and students of Fu Jen Taiwan University and CM staff

PART III: OPERATIONAL PLANNING

Implementation Plan

#	STRATEGIC OBJECTIVE: 2017–2020	START	END
1.	Gain visibility through focus on impact and Catholic identity	January, 2018	December, 2020
2.	Reduce the impact of humanitarian crises through enhanced disaster preparedness and response	January , 2018	December, 2020
3.	Support families in unstable socioeconomic conditions through the provision of:	January , 2017	December, 2020
3.1	Vocational/life-skills training to the poor	January , 2017	December, 2020
3.2	Pre-primary education for vulnerable children in UB	January , 2017	December, 2020
3.3	Guidance on Climate Resilient Agriculture (CRA)	January , 2017	December, 2020
4.	Address the causes of extreme poverty and social injustice through advocacy initiatives and a focus on gender-based violence.	January , 2018	December, 2020
4.1	Commence advocacy initiatives	January, 2018	December, 2020
4.2	Advocacy on gender-based violence	January, 2018	December, 2020
5.	Expand networks and leverage partnerships to advance mission	January, 2018	December, 2020
6.	Make professionalism a hallmark of CM	January, 2017	December, 2020
7.	Achieve sustainability through diversified income streams	January, 2018	December, 2020
8.	Champion the spirit of volunteerism	May, 2018	December, 2020

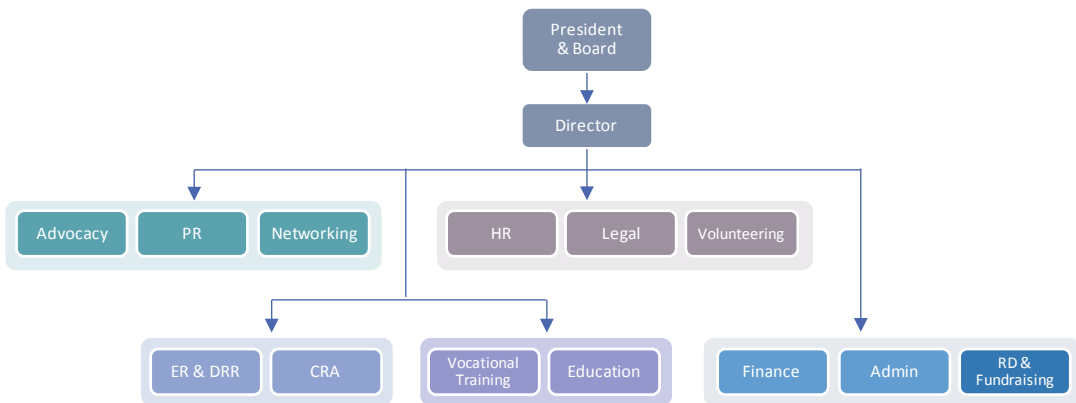
#	CROSSCUTTING THEME	START	END
1.	Community Building and Empowerment	October 2017	December 2020
2.	Integral Human Development	October 2017	December 2020
3.	Care for the Environment	January 2019	December 2020
4.	Gender	October 2017	December2020
5.	Disaster Risk Reduction	January 2018	December 2020
6.	Innovation	January 2017	December 2020

Human Resources

During the next four years, CM will align its organizational setup with its new strategies priorities. CM plans to increase its personnel in 2018 by five full-time (FT) staff. These will include an HR, an advocacy & PR specialist, an RD expert, and a support staff under DCC. The following year, CM will expand its personnel with technical staffs for the Skill Training Centre, Day Care Centre/kindergarten and ER& DRR departments and phase out the Voluntary Return department (depending however at the situation at the time).

FT STAFF	2017	2018	2019	2020
	24.5	29.5	39	36

ORGANIZATIONAL CHART 2020



Caritas Mongolia staff

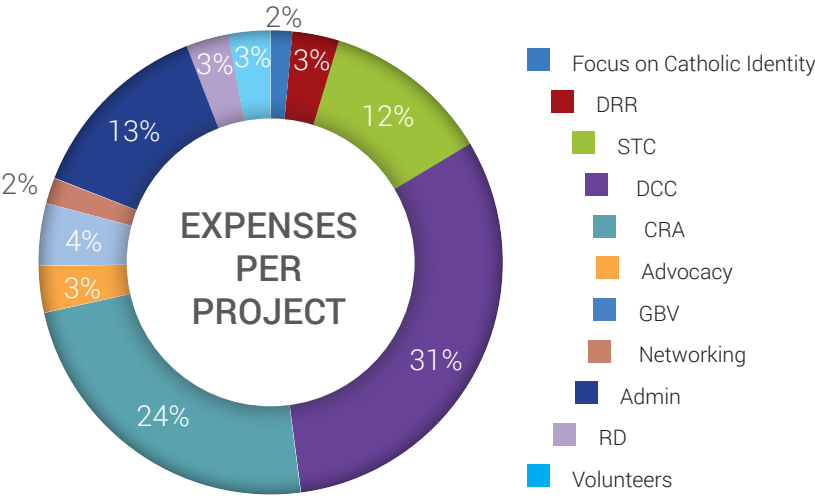
Budget Summary

Projected Expenses

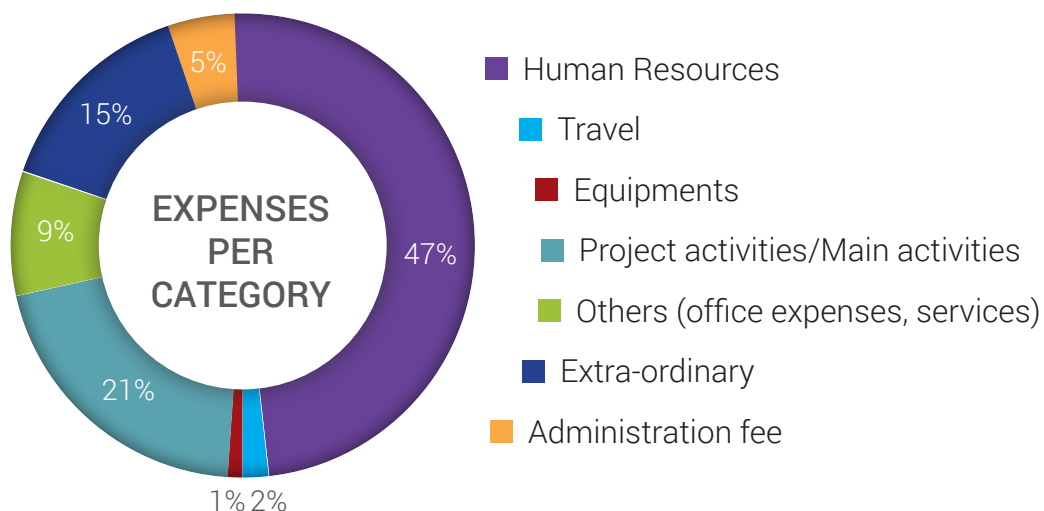
Caritas Mongolia projects it will require EUR 1,978,901 USD 2,150,979 to meet its targets.

2017-2020 BUDGET CARITAS MONGOLIA

PARTICULARS	Total	Focus on Catholic Identity	DRR	STC	DCC	
	2017-2020	1	2	3	4	
Human Resources	2 356 316 622,61	44 154 726,75	60 922 023,09	316 664 976,34	498 525 905,22	
Travel	102 435 996,80	-		3 740 000,00	-	
Equipments	41 575 000,00	-	1 200 000,00	10 800 000,00	10 825 000,00	
Project activities/Main activities	1 034 103 745,97	27 900 000,00	69 050 000,00	140 094 000,00	211 750 000,00	
Others (office expenses, services)	434 607 236,52	3 480 000,00	10 140 000,00	76 268 000,00	89 260 000,00	
Extra-ordinary	743 040 000,00	-	-	-	700 000 000,00	
TOTAL EXPENSES	4 712 078 601,90	75 534 726,75	141 312 023,09	547 566 976,34	1 510 360 905,22	
Administration fee	235 173 563,89	5 287 430,87	9 891 841,62	38 329 688,34	38 721 375,08	
GRAND TOTAL	4 947 252 165,79	80 822 157,62	151 203 864,71	585 896 664,69	1 549 082 280,30	
2 500,00	€ 1 978 901	€ 32 329	€ 60 482	€ 234 359	€ 619 633	
2 300,00	\$2 150 979	\$35 140	\$65 741	\$254 738	\$673 514	



	CRA	Advocacy	GBV	Networking	Admin	RD	Volunteers
	5	6	7	8	9	10	11
	700 506 052,12	94 775 209,01	109 252 452,23	44 154 726,75	329 879 539,39	96 558 988,61	60 922 023,09
	37 530 000,00	8 350 000,00	-	8 350 000,00	36 115 996,80	-	8 350 000,00
	-	2 200 000,00	3 300 000,00	-	13 250 000,00	-	-
	276 636 950,00	35 250 000,00	75 630 000,00	28 000 000,00	100 892 795,97	32 100 000,00	36 800 000,00
	66 180 420,00	10 690 000,00	17 402 000,00	3 480 000,00	133 511 816,52	2 880 000,00	21 315 000,00
	-	-	-	-	43 040 000,00	-	-
	1 080 853 422,12	151 265 209,01	205 584 452,23	83 984 726,75	656 690 148,68	131 538 988,61	127 387 023,09
	93 960 000,00	10 588 564,63	14 390 911,66	5 878 930,87		9 207 729,20	8 917 091,62
	1 174 813 422,12	161 853 773,64	219 975 363,89	89 863 657,62	656 690 148,68	140 746 717,82	136 304 114,71
	€ 469 925	€ 64 742	€ 87 990	€ 35 945	€ 262 676	€ 56 299	
	\$510 788	\$70 371	\$95 641	\$39 071	\$285 517	\$61 194	

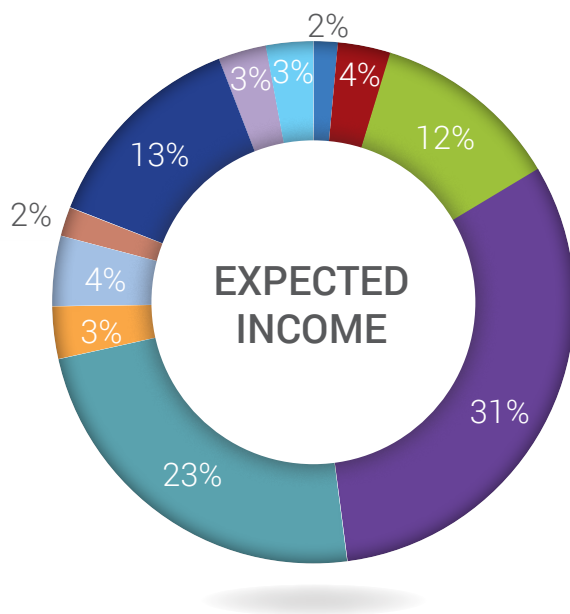


Projected Income

While most of the funding during the next 4 years will still come from its existing donor network, Caritas Mongolia aims to diversify its funding sources and increase the level of unrestricted funding. In order to achieve this, CM will increase its visibility, expand its networks, and hire the required capacity and expertise. This is expected to start yielding results in 2019.

2017-2020 BUDGET CARITAS MONGOLIA

EXPECTED INCOME	Total	Focus on Catholic Identity	DRR	STC	DCC	
	2017-2020	1	2	3	4	
Previous year balance	23 200 000	-	-	3 200 000	17 000 000	
Restricted fund/Project grants	3 859 500 000	75 000 000	152 500 000	507 500 000	1 062 500 000	
Locally generated income	23 750 000		-	-		
CM generated income	281 773 564		-	42 600 000	-	
Volunteer contributions	42 500 000		-	-	-	
Other income (benefactors, donors)	350 900 000	9 200 000	-	32 500 000	214 000 000	
Interest income	7 360 000	-	-	2 160 000	3 200 000	
Government subsidies	270 000 000	-	-	-	270 000 000	
Unrestricted fund	154 290 000	-	28 750 000	-	-	
TOTAL INCOME	5 013 273 564	84 200 000	181 250 000	587 960 000	1 566 700 000	



	CRA	Advocacy	GBV	Networking	Admin	RD	Volunteers
	5	6	7	8	9	10	11
	-	-	-	-	3 000 000	-	-
	1 137 500 000	127 500 000	200 000 000	82 500 000	372 000 000	142 500 000	-
	23 750 000	-	-	-		-	-
	-	-	-	-	239 173 564	-	-
	-	-	-	-		-	42 500 000
	15 000 000	37 000 000	22 500 000	9 200 000		-	11 500 000
	-	-	-	-	2 000 000	-	-
	-	-	-	-	-	-	-
	-	-	-	-	43 040 000	-	82 500 000
	1 176 250 000	164 500 000	222 500 000	91 700 000	659 213 564	142 500 000	136 500 000

-  Focus on Catholic Identity
-  DRR
-  STC
-  DCC
-  CRA
-  Advocacy
-  GBV
-  Networking
-  Admin
-  RD
-  Volunteers

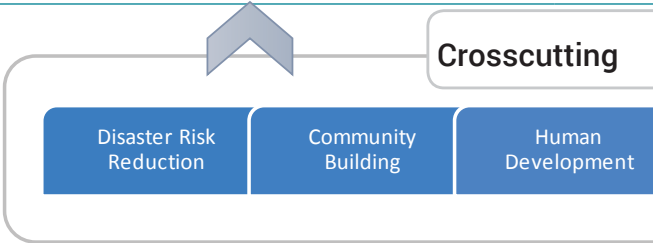
Simplified Log-Frame

STRATEGIC ORIENTATION	STRATEGIC OBJECTIVE
1: Caritas at the heart of the Church	1. Gain visibility through focus on impact and Catholic identity
2: Save lives, rebuild communities	2. Reduce the impact of humanitarian crises through enhanced disaster preparedness and response
3: Promote sustainable integral human development	3. Support families in unstable socioeconomic conditions through the provision of: <ul style="list-style-type: none"> 3.1. Vocational/life skills training to the poor 3.2. Pre-primary education for poor children in UB 3.3. Guidance on Climate Resilient Agriculture (CRA)
	4. Address the causes of extreme poverty and social injustice through: <ul style="list-style-type: none"> 4.1. Commence Advocacy initiatives 4.2. Advocacy on gender-based violence (GBV)

KEY TARGETS: 2017–2020

- | | |
|---|---|
| <ul style="list-style-type: none"> • 75,000 unique website views • 30 references in local newspapers | <ul style="list-style-type: none"> • 10,000 Facebook followers |
| <ul style="list-style-type: none"> • 50 ER volunteers trained • ER staff attended at least 1 F2F training • DRR staff completed at least 2 online trainings • DRR staff attended at least 1 F2F training • Made and used ER manual and templates | <ul style="list-style-type: none"> • ER staff completed at least 2 online trainings • Set up ER reserve fund of EUR 15,000 • Established formal relationship with NEMA • DRR mainstreamed in CRA project • Implemented at least 1 project with DRR focus |
| <ul style="list-style-type: none"> • People trained: 652–1,152 • Diversified training content: 3–6 • Male/Female: 25% / 75% • Dropout youth: 10% • Increase in income: 30% | <ul style="list-style-type: none"> • Participants with job: 192 • 75% participants rate trainings as high quality and highly relevant • Mobile-training sessions: 21 • Micro-grants: 120 (EUR 270) |
| <ul style="list-style-type: none"> • Children from vulnerable families in ger area | <ul style="list-style-type: none"> • Up to 200 children assisted |
| <ul style="list-style-type: none"> • 600 farmers assisted • 6 cooperatives created • 5 cooperatives strengthened • 300–500 members in each cooperative • 50% increase in vegetable production • 50% increase in cooperative income | <ul style="list-style-type: none"> • 30% increase in individual income • 4 unique publications/IEC material • 6 communities certified in organic farming (PGS) • EUR 1,000/year fees collected • EUR 1,500/year income from R&D plot |
| <ul style="list-style-type: none"> • Policy positions promoted: 3 developed, 2 in coalition • CM participated in 2 global CI policy initiatives | <ul style="list-style-type: none"> • Policy change affected ~250,000 people |
| <ul style="list-style-type: none"> • GBV policy positions: 1 developed, 1 in coalition • 500 GBV victims of referred to specialized agencies | <ul style="list-style-type: none"> • 25,000 youth given GBV-awareness training |

STRATEGIC ORIENTATION	STRATEGIC OBJECTIVE
4: Build global solidarity	5. Expand networks and leverage partnerships to advance mission
5: Make Caritas Mongolia more effective and efficient	6. Make professionalism a hallmark of CM
	7. Achieve sustainability through diversified income streams
	8. Champion the spirit of volunteerism



PART IV: ANNEXES

CM 2020 Business Model

This section presents Caritas Mongolia’s bundled business plan till 2020, using nine building blocks to show how CM plans to implement its programs.

Value proposition:

This is the sum of products and services CM offers its beneficiaries. Its value proposition is to be a professional and sustainable organization that advocates on behalf of the poor and aids vulnerable communities in unstable socioeconomic situations, as well as people affected by natural disasters, by partnering with local and international volunteers.

Beneficiaries:

CM’s target beneficiaries as vulnerable communities and individuals in Mongolia’s rural and urban areas. It aims to improve the living conditions of 250,000 people by 2020. To ensure the effectiveness of its business model, CM has segmented its beneficiaries based on their different needs and attributes.

Activities:

These have been categorized into two broad types: program-specific activities (e.g., setting up cooperatives) and compounding activities (e.g., networking with funders). Each type of activity has been detailed in the following table.

Channels:

CM reaches beneficiaries through its projects and organizations such as NGOs

KEY TARGETS: 2017–2020

- Established 3 partnerships; participated in 16 networking events
- Organized 2 networking events/year
- Leveraged 16 partnerships/contacts for fundraising, support (advocacy) or in-kind donations
- 10,000 Facebook followers
- Refection moments, Trainings on CST
- Develop comprehensive manuals on:
 - » HR policy
 - » Volunteer management
 - » Complaint procedures
 - » Risk reduction
 - » Finance policy
 - » Monitoring and evaluation
 - » Communication policy
 - » Information disclosure
 - » Fundraising strategy
- 15 Source of income
- EUR 2,005,309 raised
- 5% Unrestricted funds raised
- 35 % Cost sharing by beneficiaries
- 1,723 volunteers

Issues

Care for the Environment

Gender

Innovation

and government departments. It also plans to be effectively using both traditional and social media to inform and involve the larger public in its work.

Relationship:

Caritas Mongolia strives to establish personal relationships with the people it works with. Whenever possible, beneficiaries and partners will be asked to co-create programs and projects to ensure their relevance, quality and sustainability.

Resources:

These are the assets necessary to create beneficiary value and could be physical, financial, human, or intellectual. CM's programs need both hard resources (such as buildings and equipment) and soft resources (such as staff and reputation).

Partnerships:

To reduce risks, CM will not own all the resources needed to conduct its activities. Partnerships with private- and public-sector stakeholders therefore form an essential enabler. Further, by 2020, beneficiaries and partners will co-create programs to ensure project relevance, quality and effectiveness.

Revenue & Cost:

CM's revenues currently come from partner grants. By 2020, it aims to diversify its funding sources to include service fees and product sales, and it will also tap the local fundraising market to access unrestricted funding. The total cost of CM's four-year strategy amounts to EUR-2,005,309; USD-2,179,684.

CM Business Model Canvas: A bird's-eye view

Value Proposition :: Program-specific activities	Beneficiaries	Organizational Developments :: Compounding activities
<p>Climate Resilient Agriculture</p> <ul style="list-style-type: none"> • Quality training and advice for organic vegetable growing • Set up and strengthen cooperatives • Facilitate market access – promote market linkages • Achieve economies of scale for vegetable-production cooperatives • Assistance in organic agricultural certification (PGS) • Enhance resilience & economic capacity through community building <p>ER / DRR</p> <ul style="list-style-type: none"> • Respond quickly to disasters fast and restore normalcy to affected communities • Possibility to link relief, rehabilitation and development (LRRD) • Train communities on DRR; prioritize the poor and most vulnerable 	<p>Vulnerable women, men and families Families from ger areas (migrants) Individual vegetable growers Cooperatives Disaster-affected communities At-risk/vulnerable communities Children from vulnerable families School dropouts Local and international volunteers Funding partners Mongolia citizens & global partners/organizations Sponsors/change agents</p>	<ul style="list-style-type: none"> • Write proposals; develop and maintain contact databases • Create and maintain channels and networks with beneficiaries • Organize networking and fundraising events • Document organizational policies, develop organizational manuals • Build PR capacity, hire qualified staff • Focus on volunteerism • Develop appropriate material for volunteer, PR, FR and advocacy • Improve communication and visibility through annual reports, newsletters, social media • Provide visible and concrete results; develop a good track record • Improve reputation through technical expertise

<p>Education</p> <ul style="list-style-type: none"> Human-centered approach based on CST/Caritas culture Government-certified Montessori method Qualified but low-cost staff Quality control on the trainings and trainers & products Exposure to international culture through volunteers Active involvement in the lives of the children, families and community 	<p>Partnerships</p> <p>Caritas network and other funding partners</p> <p>Government departments and NGOs</p> <p>Schools and parishes</p> <p>Organic agriculture inspection agencies</p> <p>Private-sector organizations and the media</p> <p>Channels: Social media and website, projects and events</p>	<p>Relationships</p> <p>Beneficiaries: Involvement in project development and execution</p> <p>Volunteers: Cultural experience in Mongolia and opportunity to use expertise for social welfare</p> <p>Private-sector organizations: Meet CSR responsibilities through relevant, high-quality and transparent projects</p>
<p>Skills Training Centre</p> <ul style="list-style-type: none"> Human-centered approach based on CST/Caritas culture Proximity to participants Government-certified training High-quality and low cost/subsidized training Produce and market high-quality products 	<p>Resources</p> <p>Dedicated staff & volunteers</p> <p>Building, Equipment, Transportation</p> <p>PR, communication & advocacy material</p> <p>Brand & reputation</p> <p>Adequate systems & policies</p>	<p>Revenue & Costs</p> <p>Inflow:</p> <p>Grants, voluntary contributions, trainings fees, income in-kind, service fees for trainings and expertise, product sales</p> <p>Outflow:</p> <p>Projects, equipment, buildings, transport, HR, PR material, administration,</p>

Methodology

The strategic planning process used an iterative 6 phased approach. Each phase provides the foundation for the next phase. Succeeding phases however add more detail and analysis to the collected and ainformation of preceding phases. The table below provides an overview of the 6 phases.

Planning stages	Primary question:	Deliverables	Mindsets Outcomes:	Tools:
Phase 1: Set the Scene	<ul style="list-style-type: none"> » Can we agree on the proposed framework and allocate resources? » Re-connect with the mission and vision of CM as guidance and 'anchor' for the strategic priorities. 	<ul style="list-style-type: none"> » Strategic Plan Charter (ToR) 	<ul style="list-style-type: none"> » Shared understanding of the planning process 	<ul style="list-style-type: none"> » ToR template
Phase 2: Analyze the local situation & context	<ul style="list-style-type: none"> » What are the internal and external factors that have impacted (positively or negatively) the work of Caritas Mongolia in the recent past and that will impact Caritas Mongolia work in the near future? 	<ul style="list-style-type: none"> » Situation Analysis Summary 	<ul style="list-style-type: none"> » Shared understanding of external (opportunities and threats) and internal environment (strengths and weaknesses). 	<ul style="list-style-type: none"> » Environmental Scan » Sector Stakeholders Analysis » Internal Assessment » Situation Analysis Summary
Phase 3: Decide on the Strategic Choices	<ul style="list-style-type: none"> » What are the strategic issues and choices to make to help advance our mission? » How should the current programs be adjusted for greater impact, sustainability, scale or focus? » What programs should potentially be reduced, eliminated, added or strengthened? » What are the potential sources of resources, both existing and new? » Is the increase in program complexity, scale or focus appropriate and feasible? 	<ul style="list-style-type: none"> » Ranking of strategic choices 	<ul style="list-style-type: none"> » Shared understanding of the strategic issues and choices to define the local strategic approach. 	<ul style="list-style-type: none"> » Matrix Map

Phase 4: Develop a 'Business Model'	» Are the strategic choices feasible and relevant?	» Business Model Canvas per main objective » Diversification grid	» Shared understanding of our 9 building blocks	» Business Model Canvas » Business Model Quantification » Diversification Grid
Phase 5: Develop a 'business Plan'	» Are the business models viable? What resources will be required to implement the business models?	» Overview of the financial and human resources. » Implementation plan. » Overview of the risk and mitigation strategies		» Improved business model for each main program » Shared understanding of the required resources, potential organizational changes and risks » Financial projection and KPIs » Organizational HR analysis tool » Risk framework
Phase 6: Define the strategic approach	» What are the strategic priorities of CM for the next 4-year strategic plan – given the local internal and external context and analysis that were conducted?	» Strategic Plan with a clear and agreed upon targets.	» Leadership and staff agreement on the strategy & know and agree to help execute the plan.	» Strategic Plan

